



Cooking Ingredients and Meals in Spain

November 2025

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Cooking Ingredients and Meals in Spain

EXECUTIVE SUMMARY

Consumers seeking convenience and quality

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Convenience and changing lifestyles fuel growth in ready meals and soups
Health-conscious innovation and natural ingredients shape product development
Tourism and global influences boost demand for international flavours

WHAT'S NEXT?

Convenience, health and stable prices underpin positive outlook for cooking ingredients and meals in Spain
Evolving lifestyles and affordability to sustain demand for ready meals
Health awareness and regulatory changes will drive innovation and trust

COMPETITIVE LANDSCAPE

Mercadona leads as Deoleo invests in innovation and sustainability
HelloFresh and Andro enjoy rapid expansion in 2025

CHANNELS

Supermarkets strengthens dominance through adaptation and digital innovation
E-commerce and quick commerce accelerate as convenience expectations rise

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Sunflower oil shines thanks to affordable prices

INDUSTRY PERFORMANCE

Falling olive oil prices drive volume recovery but reduce value sales
Sunflower oil maintains momentum as affordable cooking staple

WHAT'S NEXT?

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Health-driven innovation set to enhance value proposition of olive oil
New regulation should strengthen transparency and quality standards in vegetable oils

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Busier and smaller households drives demand for convenience

INDUSTRY PERFORMANCE

Global flavours and chilled innovation drive growth in meals and soups
Meal kits sustains growth despite market consolidation and rising retail competition

WHAT'S NEXT?

Chilled innovation and tourism ensure steady growth in meals and soups
Health-focused innovation and clean labels set to reshape product development
Sustainability and decarbonisation initiatives should strengthen category resilience

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Global flavours and health-oriented innovation drive category expansion

Dips leads growth as guacamole and hummus gain mainstream appeal

WHAT'S NEXT?

Spicy flavours and foodservice expansion underpin future growth

Health positioning evolves towards functional and nutrient-enriched sauces

Sustainability and local sourcing to drive progress in sauces production

COMPETITIVE LANDSCAPE

Mercadona maintains overall leadership as Unilever and Heinz lose out to private label

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Premiumisation and shifting consumption habits drive value growth in sweet spreads

High-protein and indulgent innovations boost nut and seed based spreads

WHAT'S NEXT?

Premiumisation to offset volume decline as brands target older demographics

Plant-based innovation gains traction as consumers seek healthier indulgence

New honey labelling rules aim to enhance transparency and protect local producers

COMPETITIVE LANDSCAPE

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Biogran and Biscoff enjoy robust growth in 2025

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